



Center for Earned Value Management

wInsight – “How to Use” Guide

Last Updated: Aug 2007



1. Mapping wInsight to a Database on the Hard Drive

wInsight uses a pre-formatted MS Access database and therefore, the wInsight database must be mapped to an existing database before using for the first time. The following are instructions for mapping databases located on a hard drive. (Note: This step is only done once, unless the database is renamed or moved)

Perform the following steps to map a database to wInsight on your local hard drive (C:)

1. Copy the existing blank61.mdb database and rename for your use. (DO NOT CUT OR DELETE THIS EXISTING DATABASE AS IT IS NEEDED TO CREATE ADDITIONAL DATABASES IN THE FUTURE)
 - a. Copy blank61.mdb from the following location: C:\Program Files\CSSI6\Data\Access
 - b. Paste blank61.mdb to the following location: C:\Program Files\CSSI6\Data
 - c. Rename blank61.mdb to something more descriptive
 - d. Close all folders
 2. Map wInsight to the new database created above
 - a. Open wInsight 6.1 Administrator
 - b. Click FILE
 - c. Click SELECT DATABASE
 - d. Choose ADD from the Select Data Source pop up box
 - e. Name the New Data Source to match the name of the database to eliminate confusion
 - f. Choose Microsoft Jet 4.0 OLE DB Provider
 - g. Click Next to go to the CONNECTION time
 - i. Box 1 - Select Database name by browsing and pointing to the database created in step 1 above.
 - ii. Box 2 - REMOVE the word "Admin"
 - iii. Click OK
 3. Repeat steps 1 and 2 above to create additional databases on your local hard drive if needed.
- Note:**
- When the "Database Login Box" appears, leave both the "Name" and "Password" blank,
 - When the "Application Login Box" appears, leave both the "User Name" and "Password" blank.



2. Tips for Getting Around in wInsight (Administrator 6.1)



1. To move from one database to another choose File, Database, and choose from the drop-down menu.
2. The name of the currently selected database is displayed in the upper left corner under the toolbar.
3. Under the database name are three selections...Data Input, Reports, Dataset.
4. Care should be taken when under the Data Input selection as changes made here are Permanent.
5. To view the contracts contained in the database expand Dataset, double-click Contracts and then expand Contracts. Expand the individual contract names to view the periods where data has been loaded.
6. To view the CPR formats, double-click a month, then expand Reports, and double-click a format
7. For ease of changing between contracts and periods go to Options, Toolbars, and be sure that Dataset is highlighted.



3. Updating the Local Database (C:\ drive)

When you receive data from the contractor each month, the first step is to update the local database.

1. Open wInsight Administrator 6.1
2. File – Select Database – Choose your local database from the drop-down menu, OK, OK (no name or password)
3. Load the files submitted by the contractor
 - a. IMPORT .TRN or .XML files:
 - i. Utilities, Import, Browse [to: the location of the file submitted from the contractor], OPEN
 - ii. OPTIONS - **Make sure all are checked EXCEPT “User (Security) Data”**, OK, OK
 1. If there are errors or warnings that will affect your data or that you don’t understand – CANCEL, CLOSE and Call the wInsight POC.
 2. If no errors, OPTIONS, **Make sure all are checked EXCEPT “User (Security) Data”**, OK, OK
 3. If “Import Succeeded”, CLOSE
 4. If “Import Failed”, Call the wInsight POC.
 5. Repeat this process for each contract
 6. Utilities, Recalculate, (hold down “Control” key and select all contracts Imported), highlight “All Periods”, OPTIONS, check ONLY “calculate element hierarchy”, OK, OK, CLOSE when “done”.
 - b. RESTORE .WSA files:
 - i. Utilities, Restore, Browse [to: the location of the file submitted from the contractor], OPEN
 - ii. OK
 - iii. OPTIONS, uncheck User (Security) Data, OK
 - iv. OK
 - v. When Import “Succeeded”, CLOSE
 - vi. Repeat this process for each contract
 - vii. There is no need to Recalculate when Restoring a .WSA file
4. Check the data for errors and fix any errors BEFORE backing up and updating the Server Database.



4. How To Backup Data on the Local Database (C:\ drive)

It is recommended that a backup is created of the monthly data received on the local database (Create a .WSA file).

1. Open wInsight Administrator 6.1
2. File, Select Database, Choose the local database from the drop-down menu, OK, OK (no name or password)
3. Utilities, Backup
 - a. Select the contract(s) to backup
 - b. Click Browse
 - c. Choose a location and name for the file
 - d. Save as type .WSA (default)
 - e. Click OK
 - f. When "Done", click Close

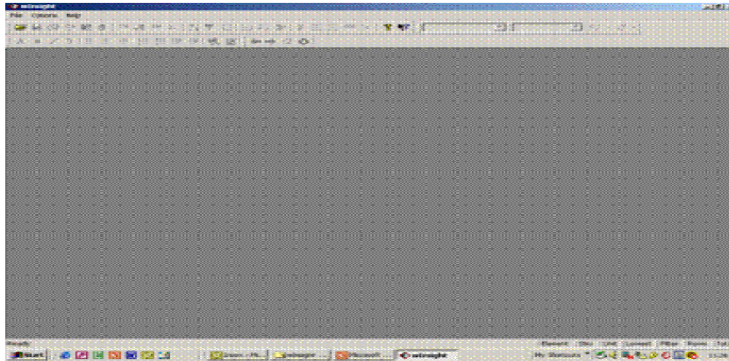


5. Accessing the Data Using wInsight 6.1

1. Open wInsight 6.1

(NOTE: The following process is shortened if you do a “Save Workspace” after following these steps the first time – see page 12)

2. File – Select Database – Select your Local Database from the drop-down menu – OK



Your screen should look similar to the snapshot on the left (no data set open). If you have a data set open, you will not have the option under **File** to **Select Database**.

If your screen looks similar to the snapshot on the right, then you have a data set open. Click **File – Close** to close out of the data set.

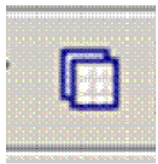
Contract	Period	WBS	OBS	Dollars	Hours
1	1	1.1	1.1	1.1	1.1
2	2	2.1	2.1	2.1	2.1
3	3	3.1	3.1	3.1	3.1
4	4	4.1	4.1	4.1	4.1
5	5	5.1	5.1	5.1	5.1
6	6	6.1	6.1	6.1	6.1
7	7	7.1	7.1	7.1	7.1
8	8	8.1	8.1	8.1	8.1
9	9	9.1	9.1	9.1	9.1
10	10	10.1	10.1	10.1	10.1
11	11	11.1	11.1	11.1	11.1
12	12	12.1	12.1	12.1	12.1
13	13	13.1	13.1	13.1	13.1
14	14	14.1	14.1	14.1	14.1
15	15	15.1	15.1	15.1	15.1
16	16	16.1	16.1	16.1	16.1
17	17	17.1	17.1	17.1	17.1
18	18	18.1	18.1	18.1	18.1
19	19	19.1	19.1	19.1	19.1
20	20	20.1	20.1	20.1	20.1
21	21	21.1	21.1	21.1	21.1
22	22	22.1	22.1	22.1	22.1
23	23	23.1	23.1	23.1	23.1
24	24	24.1	24.1	24.1	24.1
25	25	25.1	25.1	25.1	25.1
26	26	26.1	26.1	26.1	26.1
27	27	27.1	27.1	27.1	27.1
28	28	28.1	28.1	28.1	28.1
29	29	29.1	29.1	29.1	29.1
30	30	30.1	30.1	30.1	30.1
31	31	31.1	31.1	31.1	31.1
32	32	32.1	32.1	32.1	32.1
33	33	33.1	33.1	33.1	33.1
34	34	34.1	34.1	34.1	34.1
35	35	35.1	35.1	35.1	35.1
36	36	36.1	36.1	36.1	36.1
37	37	37.1	37.1	37.1	37.1
38	38	38.1	38.1	38.1	38.1
39	39	39.1	39.1	39.1	39.1
40	40	40.1	40.1	40.1	40.1
41	41	41.1	41.1	41.1	41.1
42	42	42.1	42.1	42.1	42.1
43	43	43.1	43.1	43.1	43.1
44	44	44.1	44.1	44.1	44.1
45	45	45.1	45.1	45.1	45.1
46	46	46.1	46.1	46.1	46.1
47	47	47.1	47.1	47.1	47.1
48	48	48.1	48.1	48.1	48.1
49	49	49.1	49.1	49.1	49.1
50	50	50.1	50.1	50.1	50.1
51	51	51.1	51.1	51.1	51.1
52	52	52.1	52.1	52.1	52.1
53	53	53.1	53.1	53.1	53.1
54	54	54.1	54.1	54.1	54.1
55	55	55.1	55.1	55.1	55.1
56	56	56.1	56.1	56.1	56.1
57	57	57.1	57.1	57.1	57.1
58	58	58.1	58.1	58.1	58.1
59	59	59.1	59.1	59.1	59.1
60	60	60.1	60.1	60.1	60.1
61	61	61.1	61.1	61.1	61.1
62	62	62.1	62.1	62.1	62.1
63	63	63.1	63.1	63.1	63.1
64	64	64.1	64.1	64.1	64.1
65	65	65.1	65.1	65.1	65.1
66	66	66.1	66.1	66.1	66.1
67	67	67.1	67.1	67.1	67.1
68	68	68.1	68.1	68.1	68.1
69	69	69.1	69.1	69.1	69.1
70	70	70.1	70.1	70.1	70.1
71	71	71.1	71.1	71.1	71.1
72	72	72.1	72.1	72.1	72.1
73	73	73.1	73.1	73.1	73.1
74	74	74.1	74.1	74.1	74.1
75	75	75.1	75.1	75.1	75.1
76	76	76.1	76.1	76.1	76.1
77	77	77.1	77.1	77.1	77.1
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79	79	79.1	79.1	79.1	79.1
80	80	80.1	80.1	80.1	80.1
81	81	81.1	81.1	81.1	81.1
82	82	82.1	82.1	82.1	82.1
83	83	83.1	83.1	83.1	83.1
84	84	84.1	84.1	84.1	84.1
85	85	85.1	85.1	85.1	85.1
86	86	86.1	86.1	86.1	86.1
87	87	87.1	87.1	87.1	87.1
88	88	88.1	88.1	88.1	88.1
89	89	89.1	89.1	89.1	89.1
90	90	90.1	90.1	90.1	90.1
91	91	91.1	91.1	91.1	91.1
92	92	92.1	92.1	92.1	92.1
93	93	93.1	93.1	93.1	93.1
94	94	94.1	94.1	94.1	94.1
95	95	95.1	95.1	95.1	95.1
96	96	96.1	96.1	96.1	96.1
97	97	97.1	97.1	97.1	97.1
98	98	98.1	98.1	98.1	98.1
99	99	99.1	99.1	99.1	99.1
100	100	100.1	100.1	100.1	100.1

3. Database Login: Leave both Name and Password blank - OK
4. File – Open
5. Application Login:
 - a. User Name leave blank
 - b. Password leave blank – OK
6. Double-click the contract name
7. Highlight the desired period – OK
8. You will want to add the “Data Set” Toolbar to quickly move between contracts and periods. If provided by the contractor, you can toggle between WBS & OBS and Dollars & Hours. Click Options – Toolbars – check Dataset.



6. Creating a Custom View

“Views” icon



Click the
“Views” icon

Select a
similar view
and click
Copy

Re-name
the new view

Add, delete
or move
fields

The screenshot shows the WinSight software interface. The main window displays a table with columns: Description, LVL, LL, SV, CV, VAC, VAR, SV, CV, VAC. The table contains 29 rows of data. A red dashed box highlights the 'Views' icon in the toolbar. A 'More Views' dialog box is open, showing a list of views. The 'Copy of PM Summary' view is selected. A 'View Definition' dialog box is also open, showing the 'Copy of PM Summary' view. The 'View Definition' dialog box has a 'Name' field with the text 'Copy of PM Summary' and a 'Show in View menu' checkbox. Below this is a table with columns: Column, Title, Align Title, Align Data, Width. The table contains 10 rows of data. The 'View Definition' dialog box has buttons for 'Edit', 'Copy', 'Delete', 'Up', and 'Down'.

Description	LVL	LL	SV	CV	VAC	VAR	SV	CV	VAC
1 CH 53 HLR Risk	1		↑	↑	↑	S	-8,440.8	1,756.7	3,215.7
2 Contract Milest	2						0.0	0.0	0.0
3 Program Managem	3	✓							0.0
4 Out Brief CDRL	3	✓							0.0
5 Reserved	2	✓							0.0
6 Requirements	2								992.4
7 Program/Acquisi	3								113.0
8 Reserved-	4	✓							0.0
9 Integrated Prod	4	✓							95.3
10 Meetings & Revi	4	✓							-30.7
11 Cost & Schedule	4	✓							-199.5
12 Integrated Data	4	✓							0.0
13 Data Deliverabl	4	✓							33.8
14 Preliminary IMS	4	✓							
15 Reserved-2	4	✓							
16 Reserved-3	4	✓							
17 Reserved-1	4	✓							
18 Review Governme	4	✓							
19 Reserved-4	4	✓							
20 System Requirem	4	✓	↑						
21 System Function	4	✓							
22 Risk Redution 2	4	✓	↔						
23 Source Selectio	4	✓	↓						
24 System Engineer	3		↑						
25 System Engineer	4	✓	↔						
26 Trade Studies	4	✓	↑						
27 Requirements De	4	✓	↑						
28 Risk Management	4	✓	↑						
29 Weight Control	4	✓	↔						

View Definition

Column	Title	Align Title	Align Data	Width
Element WbsNum	WBS	C	L	8F
Element ElemDesc	DESCRIPTION	C	L	8F
Element ElemLevel	LVL	C	C	5
Element Lowest	Lowest Level	C	C	5
EarnedValue.FmSVat	VAR	C	C	7
EarnedValue.BcwsCum	BCWS	C	R	10
EarnedValue.BcwpCum	BCWP	C	R	10
EarnedValue.AcwpCum	ACWP	C	R	10
EarnedValue.SvCum	SV	C	R	10



7. Creating Custom Filters

“Filter” icon



Click the “Filter” icon

Select a similar filter and click Copy

Re-name the new filter

Edit, add, delete or move fields

Winsight - [Sort:ElemFilter CH-53 HLR RR 2 WBS Mar 05 Dollars]

File Edit Sort Charts Reports Input Outputs Rowset Window Help

CH-53 HLR RR 2 MAR 05

	Description	LVL	ILL	SV	CV	VAC	VAR	SV	CV	VAC
1	CH 53 HLR Risk				1,756.7	3,215.7				
2	Contract Milest				0.0	0.0				
3	Program Managem				0.0	0.0				
4	Out Brief CDRL				0.0	0.0				
5	Reserved				0.0	0.0				
6	Requirements				992.3	992.4				
7	Program/Acquisi				112.9	113.0				
8	Reserved				0.0	0.0				
9	Integrated Prod				95.3	95.3				
10	Meetings & Rev				-38.6	-38.7				
11	Cost & Schedule				-199.5	-199.5				
12	Integrated Data				0.0	0.0				
13	Data Deliverabl				33.7	33.8				
14	Preliminary IMS									
15	Reserved-2									
16	Reserved-3									
17	Reserved-1									
18	Review Governme									
19	Reserved-4									
20	System Requirem									
21	System Function									
22	Risk Redution 2									
23	Source Selectio									
24	System Engineer									
25	System Engineer									
26	Trade Studies									
27	Requirements De	4	✓	↑	↑	↑	S	-1,828.0	-313.0	-313.1
28	Risk Management	4	✓	↑	↓	↓	S	-1,522.7	-2.4	-2.2
29	Weight Control	4	✓	⇒	↓	↓	SIC	-175.5	-127.1	-127.1

More Filters

Filters

- <All Elements>
- cm Cum Cost Drivers
- Copy of Level 1 Only
- Filter 1
- Level 1 Only
- Level 2 or Above
- No Honeywell Detail
- Top Cost Drivers
- Top Current Cost Drivers
- Top Current Schedule Drivers
- Top Schedule Drivers

Apply Close New Copy Edit Delete

Filter Definition

Name: Copy of Level 1 Only

Show in Filter menu

Pre-Logic Field Test Value Post-Logic

Element ElemLevel = 1

Edit Insert Copy Delete Up Down

EVAA7 - CH 53 HLR Risk WBS Dollars All All Elements 1-101 101

Start Inbo... wlns... Traini... WUG... WUG... Micro... wlns... My Shortcuts 16:05



8. Tips for Creating Filters



When creating a filter, try using the question mark “?” as a “wild card” to match any character.

Filter Tests

The Test drop list of the Filter Item Definition dialog box provides a list of tests which can be used to determine if a match exists between an element field and a specified Filter Value. The complete list of available tests is shown in the following table.

Test Description

=	The field equals the value
<>	The field does not equal the value
<	The field is less than the value
<=	The field is less than or equal to the value
>	The field is greater than the value
>=	The field is greater than or equal to the value
In	The field is one of a set of values (a, b, c)
Not In	The field is not in one of a set of values (a, b, c)
Like	The field matches a wildcard value
Not Like	The field does not match a wildcard value
Is	The field is null (empty, it contains no data)
Is Not	The field is not null (not empty, it contains data)



9. Inserting a Temporary Column into a Current View

- Highlight the column to the right of where you want to insert a new column.

- Right click, choose **Column – Insert**

- Select the field to insert

- You may change the title of the field, the alignment and width of the column

- To permanently insert the column to the view, you must edit the view itself

The screenshot shows the WINSIGHT application window titled "winsight - [Sort: SortVal CH-53 HLR RR 2 WBS MAR 06 Dollars]". The main data table has columns: WbsNum, CH-53 HLR RR 2, LVL, LL, SV, CV, VAC, VAR, SV, CV, VAC. A context menu is open over the table, showing options like "Sort Ascending", "Sort Descending", "More Sorts...", "Copy", "Filter", "Toggle", "Column", "View", "Go To...", "Freeze Panes", "Format...", and "Font...". The "Column" option is selected, and a sub-menu is open showing "Define...", "Insert...", and "Delete". The "Insert..." option is selected. The table data includes rows for various WBS elements, such as "EY-AA7 1.01", "EY-AA7 1.02", "EY-AA7 2", "EY-AA7 3", "EY-AA7 3.01", "EY-AA7 3.01.01", "EY-AA7 3.01.02", "EY-AA7 3.01.03", "EY-AA7 3.01.04", "EY-AA7 3.01.05", "EY-AA7 3.01.06", "EY-AA7 3.01.07", "EY-AA7 3.01.08", "EY-AA7 3.01.09", "EY-AA7 3.01.10", "EY-AA7 3.01.11", "EY-AA7 3.01.12", "EY-AA7 3.01.13", "EY-AA7 3.01.14", "EY-AA7 3.01.15", "EY-AA7 3.01.16", "EY-AA7 3.02", "EY-AA7 3.02.01", "EY-AA7 3.02.02", "EY-AA7 3.02.03", "EY-AA7 3.02.04", and "EY-AA7 3.02.05".



10. Saving a Workspace

- Open any views and reports and customize the size and location using your mouse
- Choose **File – Save Workspace**
- The next time you open wInsight this will be your default view
- Change the contract or the period and the windows automatically update
- Choose **File - Save Workspace As** and save a workspace to a local folder for future use

The screenshot displays the wInsight application window titled "wInsight - CH-53 HLR RR 2 WBS MAR 06 Dollars". The "File" menu is open, and "Save Workspace" is selected. The main window is divided into three panes:

- Top Pane:** A table titled "MAR 06 Dollars" showing financial data across five columns.
- Bottom Left Pane:** A table with columns "WbsNum", "Description", "LVL", "LL", and "SV". It lists various work breakdown structure (WBS) elements for "CH 53 HLR Risk".
- Bottom Right Pane:** A "Format 5 Narrative Report" for "CH-53 HLR Risk" as of "MAR 06". It includes contract details, an executive summary, and a detailed report section.

The taskbar at the bottom shows the Windows XP interface with the Start button and several open applications, including wInsight.



11. Viewing wlnsight's Existing Reporting Options

The screenshot shows the wlnsight software interface. The 'Reports' menu is open, showing options like 'Six Period Summary', 'Narrative', 'Format S Narrative', 'Scope of Work', 'User Narrative', 'Element of Cost', 'Custom Reports', 'Executive Summary', and 'Program Acquisition'. A double-click arrow points from the 'Six Period Summary' menu item to the 'Six Period Summary - Work Breakdown Structure (Dollars)' report window. The report window displays a table with columns for 'Current Period Data' and 'Cumulative Data' for various cost elements (ECWS, ECWP, ACWP, SCW, etc.) across months (NOV 05, DEC 05, JAN 06, FEB 06, MAR 06).

- Select **Reports** and simply choose the report you wish to view
- Double-click on a lower element to view the report by element
- To return to the previous view, close the report



12. Creating Custom Reports



- Choose Reports - Custom Reports – More Reports
- Select New to generate the report path
- Provide a report Name and Template file for the report.
- Template files are created using an HTML editor, using the Database field names to generate a report format & query the database for data.

The screenshot displays the wInsight software interface. The main window shows a table with columns: Description, CV, VAC, VAR, SV, CV, VAC. The table lists various components like CH53K SDD, Air Vehicle, Airframe, Fuselage, Transmissions & Rotors, Electrical Powe, Harness Design, Landing Gear, Environmental C, Mechanical Flig, Hydraulic Power, Propulsion (Non, Main Fuel Syste, Secondary Power, Propulsion (Eng, Air Vehicle App, Communications/, Navigation/Guid, Central Mission, (CA) Central Co, Data Display &, Automatic Fligh, FCS System Desa, FCS Subsystem D, FCS Control Law, Central Integra, (CA) Central In, and Armament.

Overlaid on the main window are two dialog boxes:

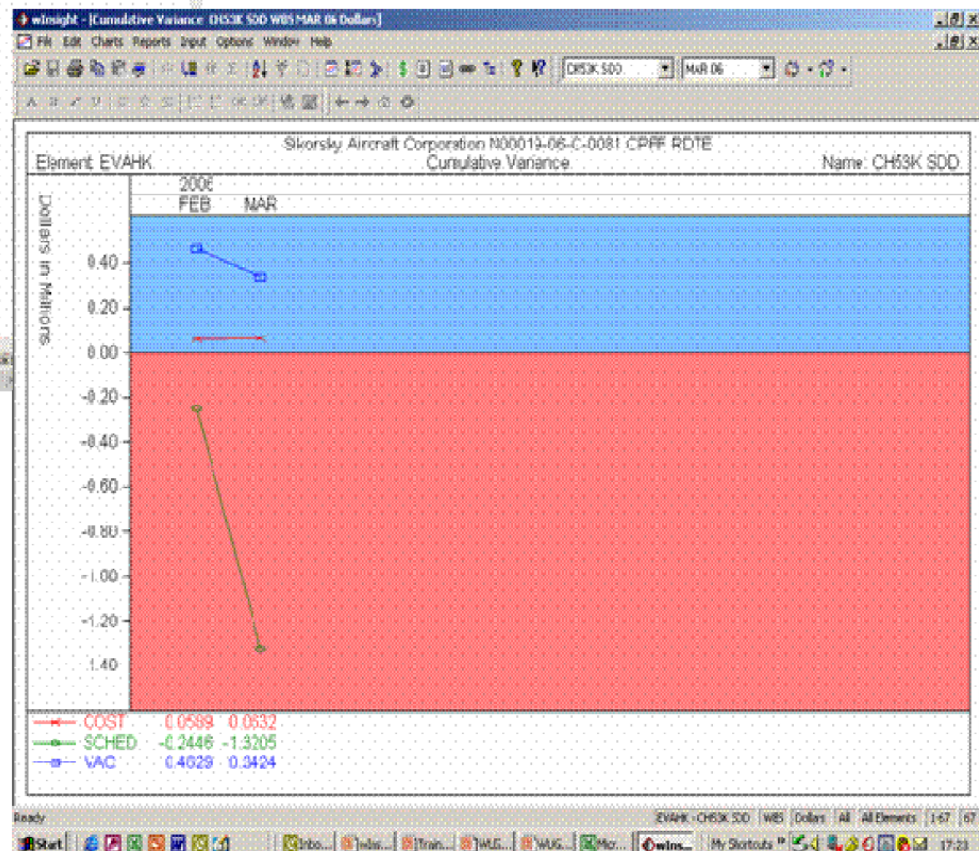
- More Reports**: A dialog box with a list of reports: All Narrative, Element of Cost, Executive Summary, Format 5 Narrative, Scope of Work, Six Period Summary, User Narrative, and Validity. It includes buttons for Display, Close, New, Copy, Edit, and Delete.
- Report Definition**: A dialog box for defining a new report. It has a 'Name' field with 'Report1' entered, a 'Template File' field with 'Report1_template.htm' entered, and a 'Show in Report menu' checkbox which is checked. It includes OK and Cancel buttons.



13. Viewing wInsight's Existing Charts



Table with 10 columns: Element, Unit, Var, CV, VAC, MAR, DV, DV, VAC. The table lists various project elements such as CH53K SDD, Air Vehicle, Avionics, etc., and their corresponding variance values.



- Select **Charts** and simply choose the report you wish to view
- Double-click on a lower element to view the chart by element
- To return to the previous view, close the



14. Creating Custom Charts



- Choose Charts
- Custom Charts
- More Charts
- Select New to generate the chart
- Provide a report Name and Edit the chart as necessary.

The screenshot displays the WinSight software interface. The main window shows a table with columns for 'Det', 'SP', 'SV', 'CV', 'VAC', 'VAR', 'SV', 'CV', and 'VAC'. The table lists various components and their associated values. A context menu is open over the table, showing options like 'Cumulative Variance', 'Cumulative Variance %', 'Current Variance', 'Current Variance %', 'VAC Chart', 'Snake Chart', 'Snake Chart (Current)', and 'More Charts...'. The 'More Charts' dialog box is open, showing a list of charts including 'Chart 1', 'Cost Performance Index', 'Cumulative Variance', 'Cumulative Variance Percent', 'Current Variance', 'Current Variance Percent', 'Estimates at Completion', 'Schedule Performance Index', 'Snake Chart', and 'Snake Chart (Current)'. The 'Chart Definition' dialog box is also open, showing the 'Name' field set to 'Chart 1' and the 'Field' set to 'Earned/Value Pct Sch'.

Det	SP	SV	CV	VAC	VAR	SV	CV	VAC
1 CH63K SDD	SP1	-1,320.5						
2 Air Vehicle	CEI	-676.4						
3 Airframe	EAC	-463.7						
4 Fuselage		-250.1						
5 Transmission		-63.5						
6 Rotors		0.0						
7 Electrical P		-0.0						
8 Harness Des		-50.9						
9 Landing Gea		-8.2						
10 Environment		-12.2						
11 Mechanical		-22.6						
12 Hydraulic P		-20.2						
13 Propulsion (I)		-14.2						
14 Main Fuel S		-7.5						
15 Secondary P		-14.2						
16 Propulsion (I)		-6.1						
17 Air Vehicle A		-0.9						
18 Communicat		0.0	2.5	3.5				
19 Navigation/G		-26.6	-1.5	1.2				
20 Central Mission	3	0.0	3.0					
21 (CA) Central Cc	4	0.0	3.0					
22 Data Display &	3	-18.6	3.0					
23 Automatic Flight	3	-98.1	3.9					
24 FCS System Desi	4	0.0	3.0					
25 FCS Subsystem D	4	0.0	3.0					
26 FCS Control Law	4	-96.1	3.9					
27 Central Integra	3	-32.4	2.6					
28 (CA) Central In	4	-32.4	2.6					
29 Armament	3	-1.5	3.0					



15. Sharing Custom Views/Filters



- Exit out of data set
 - Choose **Window – Close All**
- Select **File – Export Custom Items**
- Save the file **WSCUSTOM.XML** to any folder
- Send this file to the receiving computer
- On the receiving computer, be sure all data sets are closed and Select **File – Import Custom Items**
- Open the **WSCUSTOM.XML** file
- Select how you want the charts, filters, and views in the **WSCUSTOM.XML** file to be merged with your exiting ones and click the **OK** button

